



HQ AFSPC/PKP What we look for in reviews

Tools you can use!

November 2003



Disclaimer

- **These slides are meant as a learning tool ... a guide to assist in development of documents associated with the acquisition process**
- **The FAR and supplements always take precedence**
- **The content is not all inclusive - the focus is on those areas that have traditionally been the most troublesome for teams and most frequently commented upon by HQ AFSPC/PKP**
- **Clearance Officials and Source Selection Authorities may require additional procedures or request additional reviews**
- **Slides can not substitute for the assistance available from local policy personnel and section leaders and supervisors**
- **Comments may be addressed to the HQ AFSPC PK Policy Section at afspc.pk.v3@peterson.af.mil**



Additional Assistance

- **Available tools are referenced at applicable locations of the training material**
- **Recommendations for streamlining are included**
- **Navigation shots of homepage are located at the end of the slide presentation**
- **This briefing and training tools are located on the AFSPC Contracting homepage**
- **Extensive information is available on the SAF homepage under the Toolkit section by clicking on the specific section of the regulation (Part 7, 15 etc.)**



Diagram of Review Activity*

- **Acquisition Strategy Panel**

- **Acquisition Plan**

- **Source Selection Plan**

- **Solicitation Review/ Release**

- *Proposal*



Award Without Discussions

Award with Discussions

- **Source Selection Decision Charts/Documentation**

- **Clearance**

- *Award*

- **Competitive Range Charts**

- **Clearance**

- *Final Proposal Revision (FPR)*

- *FPR Evaluation*

- **Source Selection Decision Charts/Documentation**

- *Award*

Note: Items in **bold indicate HQ review at appropriate thresholds (see AFSPCFARS 5301 Table 1 and reference specific sections of*



Overview - Slide Index

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When HQ Reviews Are Required

- **Acquisition Strategy Panel Charts**
 - AFSPCFARS 5307.104-90
- **Acquisition Plan Reviews**
 - AFSPCFARS 5307.103
- **Source Selection Plan Reviews**
 - AFSPSCFARS 5315.308-90
- **Solicitation Reviews**
 - AFSPCFARS 5301.9502
- **Request for Clearance (RFC)**
 - **Content of RFC** AFSPCFARS 5301.9504
 - **Procedures for RFC** AFSPCFARS 5301.9505



When HQ Reviews Are Required (cont'd)

Source Selection Documentation Reviews

- **Briefing Charts**
 - **Competitive Range Charts**
 - AFFARS 5315.308-90(a)(1)
 - **Decision Briefing Charts**
 - AFFARS 5315.308-90(a)(2)
- **Analysis and Decision Documents**
 - **Proposal Analysis Report**
 - AFFARS 5315.308-90(c)(2)
 - **Source Selection Decision Document**
 - AFFARS 5315.308



Acquisition Strategy Panel Acquisition Plans

Tools

- **AFSPC Acquisition Plan Checklist**
- **For the following checklists, go to the AFSPC/PK Website, click on “Toolkit” and “Checklists”**
 - **AFSPC Small Business Checklist**
 - **AFSPC 8(a) Checklist AND**
- **Check the AFSPC Small Business site on the AFSPC/PK website**
- **AFSPC Risk Assessment Workshop**



Acquisition Strategy - Overview

- **Solid Acquisition planning involves getting the Business Requirements and Advisory Group (BRAG) together BEFORE the acquisition strategy is developed or a plan generated**
 - **Acquisition strategy must be based on identification of desired outcomes, determination and analysis of risks associated with meeting those objectives and upon the results of market research**
- **ASP membership includes contracting and functional representatives**
 - **The ASP Chairperson for acquisitions requiring HQ review is the Director or Deputy HQ AFSPC/PK**



Acquisition Strategy - Overview (cont'd)

- **Acquisition Strategy is addressed in two ways: via the Acquisition Strategy Panel (ASP) and in the Acquisition Plan (AP)***
 - **The purpose of the ASP is to discuss courses of action and available options to meet acquisition needs**
 - **The purpose of the AP is to record the history that led to the plan selected and to document that plan**

****Note: ASP charts and minutes may substitute for the AP in some cases see “Options for Streamlining” at the conclusion of this section***



ASP Charts/AP Considerations - General

- **Does AP address each requirement in:**
 - **FAR 7.105?**
 - **DFARS 207.105?**
 - **AFSPCFARS 5307.107?**
- **Do use the same numbering as in FAR and supplements for ease of review**
- **Do address both sections of the Acquisition Plan: (A) Acquisition Background and Objectives and (B) Plan of Action**
 - **The Plan of Action (B) should be based upon the Objectives and Background (A)**



ASP Charts/AP - Non-applicable areas

- **Do indicate a summary statement of which requirements are “Not Applicable” or indicate with n/a following the number that is not applicable**
- **For areas that are usually addressed in a services acquisition, a statement of “n/a” is not sufficient evidence to indicate that team considered the requirement and impact to instant acquisition**
- **If details in one section of the AP support discussions in other sections, refer reader to that section of the plan rather than repeating the information**



ASP Charts/AP Applicable Conditions

- **FAR 7.105(a)(2) Applicable Conditions**
 - **Do discuss significant conditions that affect the acquisition such as:**
 - **Compatibility with existing (legacy) systems**
 - **Impact of future systems or programs (systems upgrades, merging of programs)**
 - **Cost constraints (i.e. 20% funding cut, etc.)**
 - **Schedule constraints (must meet a certain launch schedule date)**
 - **Performance constraints (99.99% system availability)**
 - **Security constraints (SCI clearance work)**



ASP Charts/AP -Tradeoffs

- **FAR 7.105(a)(6) Trade-offs**
 - **FAR uses the term “trade-off” in lieu of “source selection” so don’t let that confuse you - use this area to discuss source selection strategy**
 - **Include rationale for selection of PPT/Best Value approach**
 - **Ensure the plan discusses potential trade-offs in a best value decision (discuss tentative types/examples of pass/fail criteria and/or mission capability subfactors proposed**
 - **AP does not need to have “Section M” level detail**



ASP Charts/AP - Risks

- **7.105(a)(7) Risks**
 - **Technical, schedule and cost risks should be addressed separately**
 - **Discussion of risk is associated with performance of the contract, not the accomplishment of the source selection**
 - **If reacquisition, discuss any changes in requirements, budget or performance expectations and risk associated with changes**



ASP Charts/AP - Mitigating Risks

- **7.105(a)(7) Risks**
- **Plan to mitigate risks should include:**
 - **Discussion of phase-in period and contract length**
 - **Discussion of CLIN type and breakout**
 - **Rationale for contract type selection that will be described later in plan (see FAR 7.105(b)(4)) Type of proposed incentive if any (performance incentive/award fee)**
 - **Discussion of how selected plan will specifically mitigate the risk**
 - **Discussion of how risk mitigation approaches relate to market research results**



ASP Charts/AP - Early Industry Involvement

- **FAR 7.105(b)(4) Does the discussion of Market Research results clearly tie to acquisition strategy decisions made?**
 - **Do address why a FAR Part 12 approach is/ is not appropriate**
 - **Do address any set-aside decisions in light of market research results**



ASP Charts/AP - Cost and Budget

- **Do not confuse discussion of budget (7.105(b)(5)) and discussion of cost (7.105(a)(3))**
 - **Budget refers to money available, estimate refers to what it will cost to perform the requirement at the performance levels desired**
- **Do discuss in detail how the government estimate was developed**
 - **Estimates should be based on actual workload data and SOW and/or performance expectations**
 - **Estimate should not merely be a number based on the incumbent's costs**
 - **If reacquisition, discuss changes in mission scope and/or performance and how these were accounted for in the estimate**



ASP Charts/AP - Cost and Budget (cont'd)

- **Do discuss plan to resolve any shortfalls between the available budget and the government estimate.**
Note: submission of unfunded requirement is not an adequate answer
- **Do discuss elements of budget estimate for out-year effort to include items such as**
 - Escalation
 - FINPLAN
 - POM
 - Changes from prior year effort (if reacquisition)
- **Do address each contract year budget and estimate separately**
 - When possible, break out discussion into functional or program areas for greater understanding



ASP Charts/AP - Performance Based

- **FAR 7.105(b)(6) Product/Services description**
 - **Does the plan explain how performance based goal will be achieved?**
 - **Does the plan discuss constraints in developing performance based requirements for this specific acquisition? (AFIs that can not be waived)**
 - **Does the plan discuss findings during market research that resulted in adoption of commercial practices?**



ASP Charts/AP- Small Business

- **Section (B) Plan of Action Sources**
 - **Bundling approach will require a cost-benefit analysis report to be completed and forwarded to HQ AFSPC/PKM (see AFSPCFARS 5307.107(a)(1) Contract Bundling)**
 - **Even when bundling does not apply, discuss work consolidations that previously were managed as separate contracts and rationale for consolidation**
 - **Discuss set-aside decisions and subcontracting opportunities in light of market research and one-on-one discussions**



ASP Charts/AP Options for Streamlining

- **ASP Charts with attached minutes may be used to meet Acquisition Plan submission requirements when:**
 - **Strategy and approach presented in ASP has not changed (If a written Acquisition Plan was developed, it would be consistent with ASP charts)**
 - **ASP charts and minutes with any attachments cover all requirements of FAR Part 7 as supplemented**
 - **If charts only refer to applicable portions, supplemental attachment addressing non applicable sections is acceptable - charts need not be re-written**
 - **If additional detail or research was requested at ASP this additional information should be provided with the charts**



ASP Charts/AP Options for Streamlining

- **Do include in Acquisition Plan items for which approval is needed (such as approval of a one-time use of a clause or provision or a contract type such as labor hour or time and materials). Signatures on plan will indicate approval and avoid generating a separate document for coordination**



Source Selection Plan

Tools

AFSPC Source Selection Plan Checklist

AFSPC Section L & M Checklist

Enhanced Small Business Criteria



Source Selection Plan - Overview

- **The source selection plan provides a discussion of how the source selection will be organized, how proposals will be evaluated and analyzed and how source(s) will be selected**
- **Section M of the RFP is extracted from the SSP and the criteria for the factor evaluation must mirror exactly what is in SSP**
- **The Source Selection Plan is approved by the Source Selection Authority (SSA) who will make the decision on which offeror(s) will be selected**
- **A source selection plan is not required for PPT actions**



SSP Considerations

- **Requirements are spelled out in AFFARS 5315.308-90**
 - **Do not reproduce AFFARS 5315.3 language to describe the source selection procedures being followed - merely indicate that AFFARS 5315.3 will be followed**
- **Do reference documents that already exist rather than repeating the information in the SSP**
 - **Do not repeat contents of the acquisition plan**
 - **Do attach copies of supporting documents to SSP rather than forwarding large contract folders with the SSP to the SSA**
- **Do identify the kind of source selection procedures being used - basic, median or agency (AFFARS 5315.303)**



SSP Considerations (cont'd)

- **Do identify SSA and SSAC members by office symbol (not name) -- in the event of change in personnel a new SSP will not be required**
- **Do include delegation to SSET Chair to release ENs when no offerors are excluded from the competitive range**
- **Do include other delegations requiring SSA approval in SSP**
- **Do assign experienced personnel to lead evaluation teams and conduct past performance evaluation**
- **Do not copy SSP from prior acquisition**



SSP Considerations - Milestones

- **Milestones should allow adequate time for:**
 - **Local, HQ AFSPC/PK & AFPEO/SV reviews**
 - **Proposal evaluation**
 - **Time between SSAC and SSA briefings to allow for changes, reviews and appropriate time required to submit read ahead packages**
 - **Check SSA schedule *first* before establishing milestones - the reality of frequent extended TDYs need to be factored into the schedule**
 - **Protest period (100-120 days) before contract start/phase-in**



SSP Considerations - Factors

- **Factors should be developed following the instructions and procedures of AFFARS 5315**
 - **In AF Source Selections four factors are used: Past Performance, Mission Capability, Risk, and Cost/Price**
 - **The SSP and Section M must address the importance of factors to each other and relationship of non-cost factors (when combined) to cost/price (FAR 15.304(d) and (e))**
 - **Factors establish a baseline against which offerors' proposals are evaluated**
 - **Factors establish the level an offeror's proposal must meet to be judged acceptable**



SSP Considerations - Factors (cont'd)

- **When discussing Factors and their evaluation:**
 - **Do not repeat the definitions of ratings contained in AFFARS 5315**
 - **Do Cite the AFFARS reference instead**
 - **Repeating information may lead to errors and could result in conflicts with source selection policy and regulation**
 - **Do not establish criteria that requires minimum education/experience levels**
 - **Prohibition for IT professionals is statutory in nature**



SSP Focus Area - Mission Capability Factor

- **Mission Capability Factor is broken into Subfactors that should:**
 - **Be limited to key discriminators based on risk analysis**
 - **Be limited to 6 or less in number**
 - **Relate objective and thresholds to available budget**
 - **Contain thresholds based on realistic performance requirements using historical data when available**
 - **Include a separate subfactor for enhanced SB subcontracting is required when applicable (template on AFSPC homepage)**



SSP Focus Area - Mission Capability Factor

- **Mission Capability Factor is broken into Subfactors that should:**
 - **Not be further broken down into elements**
 - **Clearly convey what is required to obtain a mission capability color rating of “green”**
 - **Be performance based -- require offerors to demonstrate something (output) not just submit something (input)**
 - **Provide as much information as possible about areas of desired enhancements**



SSP Focus Area - Past Performance Factor

- **Past performance Factor**
 - **Must be designated as at least as important as most important non-cost factor (AFFARS 5315.305(a)(2))**
 - **Must address recency and relevancy in relationship to *specific* acquisition**
 - **Is not limited to work accomplished by the prime contractor**
 - **Consider effort of predecessor companies, key personnel, subcontractors and teaming partners**
 - **Is evaluated using the confidence definitions in AFFARS 5315 *not* quality ratings from CPARs**



Options to Streamline Source Selections

- **For Basic Source Selections**
 - **Document via a Proposal Evaluation Report rather than a Proposal Analysis Report (see AFFARS 5315.308-90(c))**
 - **SSA Decision Briefing Charts are not required**
- **For Median Source Selections**
 - **Briefing Charts may be used as a substitute for the PAR in Median Source Selections**
- **For all source selections**
 - **Keep SSET team size to minimum needed**
 - **Request delegation of SSA to lower level when appropriate**
 - **Use the AF Source Selection Procedures Guide for assistance**



Solicitation Review

Tools

AFSPC Solicitation Checklist

AFSPC Inspection Checklist

AFSPC Section L&M Questions to Ask XXX



Solicitation - Overview

- The purpose of a solicitation review is to ensure that reviewed solicitations are consistent with current acquisition policies and procedures; that the stated requirements lead to the desired objectives; and that the solicitation provides the basis for a sound, workable contract. The solicitation review is discussed in AFSPCFARS 5301.9502. Solicitation amendments must also be submitted for review if substantive changes are made, e.g., significant changes to Sections B, H, I, L, and M. The reviewing authority for the contemplated clearance prescribed in Attachment 5301-2 must be the reviewing authority for the solicitation. The Clearance Reviewing Authority (CRA) reviewer is responsible for performing the review and providing recommendations to the contracting officer.



Solicitation File Review

- **Do use AFSPCFARS Attachment 5301-2 as template for clearance request**
- **Ensure D & Fs are processed and approved at appropriate level such as approval of a one-time use of a clause or provision or a contract type such as labor hour or time and materials.**
- **Vehicles provided as GFP must be approved by HQ AFSPC/LCRP**
- **If potential Conflicts of Interest may exist, follow analysis and recommendation requirements for approval by the Chief of the Contracting Office IAW FAR 9.506(b)-(d)**



Solicitation File Review (cont'd)

- **Section B**
 - **Contract type must be identified for each CLIN**
 - **There must be a separate CLIN/SubCLIN for each fund cite/ACRN (DFARS 204)**
 - **If there are Contract Data Requirement List (CDRLs) an Exhibit should be establish as depicted in DFARS 204.7105**
- **Section H**
 - **Do not develop special requirements that duplicate other contract clauses**
 - **HQ AFSPC/PKP approval of local multiple-use clause required AFFARS 5301.304**
- **Section I clauses**
 - **Fill-ins should be completed**
 - **Information in clauses should not be duplicated in other sections of the solicitation (e.g. Sections H, L and M)**



Solicitation File Review Section **L**

- **Section L**
- **If you plan to use the internet for submission and distribution of information within the source selection team include language alerting offerors to this planned approach (sample language can be found in the Source Selection Transmission **training**)**
- **Section L should be specifically developed for each acquisition and not “cookie cut” from another solicitation**
- **If oral presentations are used, the process needs to be clearly defined:**
 - **Time limits**
 - **Limits on written material**
 - **Where and when presentations will be conducted**
 - **Who should participate in presentation**
 - **How offeror presentation schedule will be determined**



Solicitation File Review Section L (cont'd)

- **Section L continued**
 - **Section L should request minimum required to evaluate proposals in accordance with Section M criteria**
 - **Do not include the process the government will use to evaluate the proposals as it is discussed in Section M of the solicitation as approved in the source selection plan**
 - **Review what contract provision FAR 52.215-1, Instructions to Offerors- Competitive Acquisition, already states regarding the source selection process -- no need to duplicate**



Solicitation File Review Section L (cont'd)

- **Section L - Past Performance**
 - **Have offerors explain how past performance relates to the requirement - how it is relevant**
 - **Do not limit offeror to set number of relevant contracts either as a minimum or a maximum**
 - **Remember to request that offerors include relevant past performance information pertaining to subcontractors, teaming partners, key personnel and predecessor companies**
 - **Do not limit government to only using referenced past performance projects/submitted material - refer to conducting past performance in accordance with FAR 15 and AFFARS 5315 which permits government to use other resources in conducting analysis**



Solicitation File Review Section L (cont'd)

- **Section L – Past Performance continued**
 - ***If* determined necessary , past performance questionnaires must:**
 - **Be tailored to acquisition**
 - **Use rating definitions in DoD Past Performance Guide (as used in CPAR evaluations)**
 - **Not require repeating information in PPAIS, ACASS, CCASS**
 - **Not ask respondent to rate more than one item per questions (e.g. were submittals *correct* and *on-time*? Contractors should not be required to follow-up on questionnaire respondents**
 - **Require that completed replies be sent to Government**



Solicitation File Review - Section M

- **Section M**
 - **See comments under SSP regarding development of factors/subfactors**
 - **Section M - Evaluation Criteria must be identical to the Source Selection Plan**
 - **For PPT Actions refer to comments under SSP section regarding addressing past performance**



Solicitation File Review - Section M (cont'd)

- **Section M**
 - **Do not include extensive information that will be found in the rest of the RFP**
 - **Do not repeat language found in FAR or supplements**
 - **Simply state reference to FAR 15 or AFFARS 5315 or the provision at FAR 52.215-1 (or 2 for commercial items) rather than repeating information contained in the regulations, provisions and clauses**



Solicitation File Review (cont'd)

- **Award fee plans should follow Air Force or AFSPC Award Fee Guides**
- **New solicitations should be specifically developed for each acquisition based on acquisition risks and not generated by copying older word processing file**
- **Statements of Work for services (to include A&AS) should be performance based and follow format of AFI 63-124**



Solicitation Streamlining Suggestions

- **Expedite evaluation by requesting past performance information prior to the remainder of the proposal**
- **Check the PPIRS/CCASS/ACASS Systems *first* before developing any kind of past performance questionnaire**
- **Do not repeat material in the RFP that is already covered in FAR and supplement provisions or clauses**



Solicitation Streamlining Suggestions (cont'd)

- **Review Section L and M - make sure everything requested to be submitted by the offeror in L will be used in the evaluation under Section M**
- **Check for any changes to the supplements that may have occurred after the SPS RFP was generated before submitting the file for review**
- **Run spelling and grammar check before releasing solicitation to industry**



Source Selection Competitive Range Charts

Tools

AFSPC Source Selection Briefing **Templates**

AFSPC Documenting Most Probable **Cost**

AFSPC Mission Capability vs Risk Training XXX



Competitive Range - Overview

- **Competitive Ranges are discussed at FAR 15.306(c) and AFFARS at 5315.306(c).**
- **A competitive range is established prior to entering discussions with offerors**
- **A competitive range is used when the contracting officer recommends eliminating offeror(s) based on the initial ratings of all offerors in accordance with the evaluation criteria in the RFP**
- **The competitive range consists of the most highly rated proposals**
- **A competitive range can be limited for purposes of efficiency**
- **All offerors may be included in competitive range**
- **Offerors excluded from the competitive range must be notified and offered the opportunity for a debriefing (pre or post-award)**



Competitive Range Chart Considerations

- **All proposals should be addressed**
- **Initial evaluation for all offerors should be summarized for all factors and subfactors**
- **Explain why selected offerors remaining the competitive range are considered “most highly rated”**
- **Ratings given following initial evaluation must be traceable to evaluation worksheets and Section M evaluation criteria**
- **Ratings must be applied consistently (same weakness = same ratings) for all offerors being evaluated**
- **It should be clear what distinguishes each proposal**



Competitive Range Charts - Color and Risk

- **Key Considerations:**
 - **Color & risk ratings must be substantiated with key discriminators**
 - **There is no need to spend lots of time talking about why a subfactor has been given green and/or low risk**
 - **Discussion should be focused on subfactors that do not meet the requirement and those that exceed the requirement**
 - **Discussion should focus on risk ratings that are other than low**
 - **Benefits associated with blue ratings must be explained in terms of their impact on the contract requirements as evaluated in Section M**
 - **Strengths and inadequacies must be addressed in discussion of color rating**
 - **Weaknesses must be addressed in discussion of risk rating**



Competitive Range Charts - Past Performance

- **Key considerations for Past Performance Factor:**
 - **Past performance should focus on relevancy of the work not just a listing of quality ratings**
 - **Identify impact of past performance of offeror (includes prime, predecessor companies, key personnel, subcontractors and teaming partners) in relation to proposed work on instant contract**
 - **Summarize what key things drove team rating**
 - **Discuss how adverse past performance impacted ratings**
 - **Summarize past performance in relationship to Section M criteria for relevancy and SOW requirements**



Competitive Range Charts - Cost/Price

- **Key considerations in Cost/Price Analysis:**
 - **Imbalance in CLIN pricing within proposal and between offerors needs to be explained**
 - **Differences between offerors' pricing should be explained in relationship to their proposed approach and elements of their pricing structure such as overhead, fee, labor rates and so forth**
 - **Most Probable Cost adjustments should be justified based on offeror's approach and the weaknesses and inadequacies identified**
 - **Do not present detailed calculations - explain what went into the analysis (e.g. proposal, DCAA assistance, WD) and the end result of the analysis**



Clearance Review

Award Without Discussions
Final Proposal Revision
Sole Source Clearance Review

Tools

AFSPC Clearance Review Checklist

**See tools associated with
Decision Briefing as well**



Clearance - Overview

- **The purpose of a clearance review is to ensure:**
 - **Evaluation of proposals is consistent with the criteria in Section M**
 - **That all offerors have been fairly considered**
 - **Documentation supports evaluation results**
 - **Decision to Award Without Discussion, when recommended, is in the best interest of Government**
 - **Discussions held were meaningful**
 - **Recommendations to SSA for award decision are supported**
 - **No legal or regulatory issues would prevent award**
 - **Provide objective view for clarity and consistency**



Clearance Review

- **Clearance is required at the thresholds identified in AFSPCFARS 5301.90 and Table 1 - Part E**
 - **Competitive Actions - one of two cases will apply**
 - **When requesting to Award Without Discussions or**
 - **When Discussions have ended and prior to Requesting Final Proposal**
 - **Clearance is also required for actions resulting from Performance-Price Tradeoffs at the applicable threshold**
 - **For Noncompetitive actions, obtain clearance prior to entering negotiations if traditional pricing is used, or to conclude negotiations if IPT pricing is used**



Clearance - A note about Evaluation Notices

- **Did ENs clearly convey concerns by specifically addressing the problem ?**
- **Did ENs clearly identify the area of the proposal in question?**
- **When EN is written as a result of an oral presentation, repeat the statement that was made by the offeror as recorded in the official government record**
- **Discussion items (ENs) must be based on something included in evaluation criteria in RFP (can only evaluate criteria specified in RFP)**



Clearance - Award Without Discussions (AWOD)

- **Considerations for (AWOD) Decision:**
 - **Consider the potential outcome of discussions**
 - **How difficult would it be for offeror to make needed corrections?**
 - **What would the impact be if corrections are made? (Might discussions place an offeror being excluded from the competitive range in a more favorable position than an offeror being selected in AWOD scenario?)**
 - **Will discussions result in better/clearer contract?**
 - **Have past performance issues been fully resolved?**
 - ***NOTE: Past performance issues can be resolved as clarifications***



Clearance - AWOD Considerations (cont'd)

- **Have you fully justified why discussions would not be prudent when a potential unsuccessful offeror represents better past performance, higher mission capability, lower risk or significantly lower cost than the recommended awardee?**
- **Explore the root cause for failure or weakness of offeror's proposal**
 - **Could offeror weaknesses or failures indicate the government failed to adequately convey requirements?**



Clearance to Request Final Proposal Revision

- **Considerations when Requesting Final Proposal Revisions at Conclusion of Discussions with offerors in competitive range:**
 - **Were all ENs dealing with past performance issues fully resolved?**
 - **Have offerors had the opportunity to comment on adverse past performance which they would not have been aware of through the process of official government evaluation?**
 - **Were other ENs fully resolved?**
 - **It should *usually** be clear that the offeror exceeds (Blue) meets (Green) or fails (Red) to meet criteria**
- * *ENs and subsequent discussions should be clear enough so that we do not end up with yellow ratings but there may be cases when, even after meaningful discussions, the offeror doesn't provide a clear answer and the final rating will be yellow*



Clearance Review for Sole Source Actions

- **Ensure the negotiation objective is reasonable**
 - All cost elements in Pre-PNM should be addressed and Objective is supported
- **Obtain further clearance to negotiate outside objective**
- **Clearly explain differences between objective, proposed and negotiated values**
- **Technical evaluation should focus on skills, hours and materials proposed**
 - See Technical Evaluation **Checklist**
- **Modifications to existing contracts may require clearance**
 - See Modification **Checklist**
- ***Streamlining tip: Maximize use of IPT pricing technique for sole source actions as permitted per AFFARS 5301.9000(b)(2) and discussed in the DoD Pricing Guide***
Negotiation Techniques - Exchanges Prior to Negotiations



Clearance Streamlining Suggestions

- **Expedite the review process by requesting review of past performance evaluation prior to requesting review of other components of the source selection**
- **Review responses to all ENs to make certain they have been resolved**
- **Review all ratings one last time against Section M criteria prior to submitting package for clearance review**



Source Selection Decision Briefing

Tools

AFSPC Source Selection Briefing **Templates**

AFSPC Past Performance **Checklist**

Documenting Most Probable **Cost**



Source Selection Decision Briefing - Overview

- The Decision Briefing is held after the initial proposal evaluations are complete, if the award will be made without discussions **or** after completion of final proposal evaluations, when discussions were conducted. The briefing contains matrices displaying Mission Capability ratings, proposal risk ratings, past performance evaluation, and cost/price analysis for all offerors, according to definitions contained in AFFARS 5315.305 and contains supporting narrative in bullet form characterizing all significant strengths, weaknesses, deficiencies, proposal inadequacies, and risks to be considered by the SSA, regarding the comparison of offerors' proposals and past performance.



Source Selection Decision Briefing Charts

- ***Is final evaluation of each offeror summarized (not initial evaluation)? ****
 - ***Do not compare final ratings to initial ratings for offerors in competitive range****
- ***Are all offers remaining in the competitive range* addressed?***
- ***Is it clear that discussions were meaningful and final ratings are appropriate based on Section M?***

****Note: When awarding without discussions no competitive range is established and decision briefing charts will address ALL offerors***



Decision Briefing Charts (cont'd)

As a minimum, the following information should also be included in a decision briefing:

- * Summary of offerors' proposed approaches**
- * Funding issues**
- * Contractual considerations**
- * Exceptions to Terms and Conditions**
- * Recap of factors and relative importance***
- * Recap of distinguishing aspects of this acquisition**
- * Any written analyses by the SSAC, if applicable**
- * Comparative comments for trade off analysis for the SSA's**

consideration in making an integrated assessment of best value

****Note: refer to prior discussion regarding factor evaluation under competitive range charts. The same standards for evaluation of Section M factors and subfactors apply for initial and final evaluation of offeror proposals***



Proposal Analysis Report (PAR)

Tools

AFSPC “PAR Questions to **Ask”**

**AFSPC “Past Performance Questions to
Ask”**



Proposal Analysis Report (PAR)

- Overview

- **This document is divided into four (4) parts that capture the formal evaluation results that will be used to formulate the SSA decision. (Part I Introduction, Part II Description of Proposals - Summaries, Part III Evaluation Results and Part IV Comparative Analysis of Offers.) Care should be taken in the construction of the PAR to ensure consistency with Decision Briefings.**
- ***Note: For acquisitions that are conducted under Basic source selection procedures a Proposal Evaluation Report is completed in lieu of the PAR. Information about the PER and other Basic Source Selection aspects can be found in the AF Source Selection Procedures Guide***



PAR Considerations

- **Does PAR follow format in the Air Force Source Selection Procedures Guide (with exception of past performance section)?**
- **Is each Mission Capability Subfactor addressed for each offeror remaining in the competitive range?**
- **Does the document clearly discuss rationale for giving ratings that are yellow, red or blue?**
- **Does the document clearly explain, in a tangible manner, what the benefits are to the Air Force when a blue rating is given?**



PAR Considerations (cont'd)

- **Performance Risk evaluation is documented and is properly distinguished from Mission Capability**
- **Basis for Past Performance rating is thoroughly documented (recency, relevancy, and quality)**
- **Is it clear which specific aspects of the factors and subfactors differentiated the offerors?**
- **Is the impact of the differences between proposals clearly articulated?**



PAR Considerations (cont'd)

- **Does the PAR clearly address why offerors with higher rated past performance or lower cost not selected for award do not present a more favorable choice to the government?**
- **For PAR supporting AWOD actions, does the PAR discuss all offerors?**



Source Selection Decision Document (SSDD)



Source Selection Decision Document (SSDD)- Overview

- **The Source Selection Decision Document is the single document that provides insight into the SSA's integrated assessment and resultant decision. It is important that this document be written clearly and in a manner that allows it to stand on its own without need of referencing other documents. Usually, the decision comes down to a serious debate between the relative merit of two or three offers, and the SSDD should reflect this debate.**



SSDD Considerations

- **Ensure SSDD is a stand alone document and as such should not reference other documents**
- **SSDD is not a repeat of the PAR - it is the essential critical reason the SSA selected one offeror rather than another**
- **Source Selection Decision must be consistent with evaluation criteria (other factors, not related to evaluation criteria cannot be basis for decision)**
- **SSDD must compare aspects of most competitive offerors against each other**



SSDD Considerations (cont'd)

- **SSDD must be fully traceable to the PAR and briefing charts**
- **If necessary to support the decision, proprietary and source selection information must be included (don't be scant just to make FOIA releases easier)**
- **When there is clearly an offeror second in line for award, the SSDD should identify that offeror even if there was no distinct ranking of all others.**
- **SSDD should be written in the first person of the SSA "I decided...."**



Tools

• The following is a listing tools discussed in this briefing and found on the AFSPC homepage

- **Acquisition Plan Checklist**
- **Source Selection Plan Checklist**
- **Small Business and 8(a) Checklist**
- **Past Performance Checklist**
- **Risk Assessment Training**

- **AFSPC Award Fee Guide**
- **Others:**
 - **Modification Checklist**
 - **Technical Evaluation Checklist**

- **Under Source Selection Training:**
 - **Documentation Module**
 - **Templates for Briefings**
 - **Documenting Most Probable Cost**
 - **PAR Questions to Ask**
 - **Source Selection Transmission training**
 - **Section L & M Development - Questions to Ask**
 - **Mission Capability vs Risk**



Website



HQ AFSPC CONTRACTING DIVISION - PK

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2003 Contracting Opportunities Briefing

(given 17 Oct 2003 in
Colorado Springs, CO)

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Sample PEO Competitive Range Briefing (posted 4 Nov 2003)

{Please view this file in "Notes Page" format
and read the notes included in the text}



PEO Lessons Learned (posted 4 Nov 2003)



Sep 2003 Revised Checklists (posted 3 Oct 2003)

- ✓ [J&A Checklist](#)
- ✓ [Revised Acq Plan Checklist](#)
- ✓ [Revised Technical Evaluation Checklist](#)

✓ [Also check out the revised AFSPC
Contract Pricing and Unsolicited
Proposal Guide](#)

The October 2003 Policy Bulletin is now available!!! (posted 4 Nov 2003)

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HQ Contracting Checklists

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